

AMENDMENT OF SOLICITATION/MODIFICATION OF CONTRACT				1. CONTRACT ID CODE J		PAGE OF PAGES 1 2	
2. AMENDMENT/MODIFICATION NO. 0002		3. EFFECTIVE DATE 02-Feb-2004		4. REQUISITION/PURCHASE REQ. NO. W68MD9-3337-6366		5. PROJECT NO.(If applicable)	
6. ISSUED BY USA ENGINEER DISTRICT, SEATTLE ATTN: CENWS-CT 4735 EAST MARGINAL WAY SOUTH SEATTLE WA 98134-2329		CODE W912DW		7. ADMINISTERED BY (If other than item 6) See Item 6		CODE	
8. NAME AND ADDRESS OF CONTRACTOR (No., Street, County, State and Zip Code)				X		9A. AMENDMENT OF SOLICITATION NO. W912DW-04-R-0014	
				X		9B. DATED (SEE ITEM 11) 24-Dec-2003	
						10A. MOD. OF CONTRACT/ORDER NO.	
						10B. DATED (SEE ITEM 13)	
CODE		FACILITY CODE					
11. THIS ITEM ONLY APPLIES TO AMENDMENTS OF SOLICITATIONS							
<input checked="" type="checkbox"/> The above numbered solicitation is amended as set forth in Item 14. The hour and date specified for receipt of Offer <input checked="" type="checkbox"/> is extended, <input type="checkbox"/> is not extended. Offer must acknowledge receipt of this amendment prior to the hour and date specified in the solicitation or as amended by one of the following methods: (a) By completing Items 8 and 15, and returning <u>1</u> copies of the amendment; (b) By acknowledging receipt of this amendment on each copy of the offer submitted; or (c) By separate letter or telegram which includes a reference to the solicitation and amendment numbers. FAILURE OF YOUR ACKNOWLEDGMENT TO BE RECEIVED AT THE PLACE DESIGNATED FOR THE RECEIPT OF OFFERS PRIOR TO THE HOUR AND DATE SPECIFIED MAY RESULT IN REJECTION OF YOUR OFFER. If by virtue of this amendment you desire to change an offer already submitted, such change may be made by telegram or letter, provided each telegram or letter makes reference to the solicitation and this amendment, and is received prior to the opening hour and date specified.							
12. ACCOUNTING AND APPROPRIATION DATA (If required)							
13. THIS ITEM APPLIES ONLY TO MODIFICATIONS OF CONTRACTS/ORDERS. IT MODIFIES THE CONTRACT/ORDER NO. AS DESCRIBED IN ITEM 14.							
A. THIS CHANGE ORDER IS ISSUED PURSUANT TO: (Specify authority) THE CHANGES SET FORTH IN ITEM 14 ARE MADE IN THE CONTRACT ORDER NO. IN ITEM 10A.							
B. THE ABOVE NUMBERED CONTRACT/ORDER IS MODIFIED TO REFLECT THE ADMINISTRATIVE CHANGES (such as changes in paying office, appropriation date, etc.) SET FORTH IN ITEM 14, PURSUANT TO THE AUTHORITY OF FAR 43.103(B).							
C. THIS SUPPLEMENTAL AGREEMENT IS ENTERED INTO PURSUANT TO AUTHORITY OF:							
D. OTHER (Specify type of modification and authority)							
E. IMPORTANT: Contractor <input type="checkbox"/> is not, <input type="checkbox"/> is required to sign this document and return _____ copies to the issuing office.							
14. DESCRIPTION OF AMENDMENT/MODIFICATION (Organized by UCF section headings, including solicitation/contract subject matter where feasible.) TITLE: Seattle District Leadership Development Program 2004 thru 2005, Seattle, Washington SEE ATTACHED CONTINUATION SHEET							
Except as provided herein, all terms and conditions of the document referenced in Item 9A or 10A, as heretofore changed, remains unchanged and in full force and effect.							
15A. NAME AND TITLE OF SIGNER (Type or print)				16A. NAME AND TITLE OF CONTRACTING OFFICER (Type or print)			
				TEL: _____ EMAIL: _____			
15B. CONTRACTOR/OFFEROR _____ (Signature of person authorized to sign)		15C. DATE SIGNED		16B. UNITED STATES OF AMERICA BY _____ (Signature of Contracting Officer)		16C. DATE SIGNED 02-Feb-2004	

SECTION SF 30 BLOCK 14 CONTINUATION PAGE

SUMMARY OF CHANGES

- a. The purpose of this amendment is to incorporate the information set forth from the Pre-Bid Conference taken place in the Seattle District Office on 15 January 2004, and to extend the date when proposals are to be submitted to this office from 9 February 2004 to 11 February 2004 at 2:00PM Local Time.
- b. The second page of the solicitation, entitled, "Caution to Offerors", is replaced with the attached page entitled the same.
- c. The Bid Schedule, located in Section B, is replaced with the attached Bid Schedule.
- d. The Statement of Work is replaced by the revised Statement of Work attached to this amendment.
- e. The Pre-Bid Conference Slides, Minutes and Sign-Up Sheet is hereby incorporated to reflect the details and intent of this program.
- f. Any attachments that are being replaced will have changes that reflects a verticle line on the left side of the page.
- g. There are no other changes as a result of this amendment.
- h. Acknowledgement of this amendment will be signed and submitted with the Price Proposal on 11 February 2004 at 2:00PM Local Time.

(End of Summary of Changes)

!!! CAUTION TO OFFERORS !!!

1. **TELEPHONES:** Limited telephone service is provided in the lobby. Only two public telephones may be used by bidders for completing bids.

2. **BUSINESS HOURS:** For the Seattle District Corps of Engineers are from 7:30 A.M. to 4:00 P.M., Monday through Friday.

BEFORE SIGNING AND MAILING THIS BID, PLEASE TAKE NOTE OF THE FOLLOWING, AS FAILURE TO PERFORM ANY ONE OF THESE ACTIONS MAY CAUSE YOUR BID TO BE REJECTED

3. **AMENDMENTS:** Have you acknowledged receipt of **ALL** amendments? If in doubt as to the number of amendments issued, please contact the representative listed on the Information Page.

4. **AMENDED BID PAGES:** If any of the amendments furnished amended bid pages, **the amended bid pages must be used** in submitting your bid.

5. **MISTAKE IN BID:** Have you reviewed your bid price for possible errors in calculation or work left out?

6. **TELEGRAPHIC MODIFICATIONS:** The Seattle District does not have the capability of receiving commercial telegrams directly. Bidders who wish to modify their bid by telegram are urged to ensure that telegrams are submitted within enough time to arrive at the bid opening room prior to the time specified for bid opening. Any doubt as to time should be resolved in favor of **EXTRA TIME.** Transmission by Fax to this office is **NOT ACCEPTABLE.**

7. **OFFER ACCEPTANCE PERIOD:** The minimum offer acceptance period is specified in block 12, SF33, Solicitation, Offer and Award. Please ensure that you allow at least the stated number of calendar days for the Government to accept your offer.

8. **CENTRAL CONTRACTOR REGISTRATION:** Per DFARS Clause 252.204-7004, REQUIRED CENTRAL CONTRACTOR REGISTRATION, in Section I FAR Clause 52.204-7, registration is required prior to award of any contract from a Solicitation issued after May 31, 1998. No Contract Award will be made to an unregistered contractor. Internet access allows contractors to register by completing an electronic on-line registration application from CCR homepage at <http://www.ccr.gov/>. For further assistance in completing your on-line registration, contact the nearest Procurement Technical Assistance Center (PTAC) near you. A list of the nearest PTAC is located at: <http://www.rcacwv.com/ptac.htm>.

9. **HUBZONE CERTIFICATION:** Per FAR Clause 52.219-4, NOTICE OF PRICE EVALUATION PREFERENCE FOR HUBZONE SMALL BUSINESS CONCERNS (JAN 1999) in Section I. A HUBZone small business concern, as used in this clause, means a small business concern that appears on the List of Qualified HUBZone Small Business Concerns maintained by the Small Business Administration Reference: <https://el.sba.gov:90000/prodhubzone/hubzone/approval.st>.

SECTION B
SUPPLIES OR SERVICES AND PRICES/COSTS

<u>ITEM</u>	<u>DESCRIPTION</u>	<u>QUANTITY</u>	<u>UNIT</u>	<u>UNIT PRICE</u>	<u>EXTENDED AMOUNT</u>
0001	Provide nonpersonal professional services to design, develop and administer a part-time leadership management development program for 10-12 Seattle District Corps of Engineers employees. Services shall begin 1 June 2004 through 30 June 2005. All work shall be performed in strict compliance with the attached Statement of Work, dated 1 December 2003, and all other terms and conditions incorporated herein. All costs associated with this line item will be inclusive of the following activities outlined in the Scope of Work:	13	Months	\$ _____	\$ _____
	(a) Administrative/overhead costs associated with program development, curriculum planning, and administration of the part time leadership management development program.		Cost	\$ _____	
	(b) Orientation/goal setting sessions to initiate program for Seattle District Corps of Engineers employees (see Section C, paragraphs 3.4.5).		Cost	\$ _____	
	(c) Orientation/goal setting retreat, two and one half (2.5) days. Session includes accommodations for retreat; living and dining expenses for all retreat participants (see Section C, paragraph 3.4.6).		Cost	\$ _____	
	(d) Provide formal Graduate Level Leadership and Management classroom training.		Cost	\$ _____	
	(e) Field Trip: One five (5) - day field trip (see Section C,		Cost	\$ _____	

paragraph 3.4.3)

(f) Counseling Sessions. At least two (2) hours per Management Intern (see Section C, paragraph 3.4.9).

Cost \$ _____

(g) A two (2) - day ;mid-year retreat for reflecting on learnings thus far, sharing feedback, assessing goal achievement, and continuing team development (see Section C, paragraph 3.4.7).

Cost \$ _____

(h) A one (1) day year-end retreat for additional reflection, introspection and planning for future personal development (see Section C, paragraph 3.4.8).

Cost \$ _____

(i) Graduation ceremony to recognize achievements of the Management Interns and to celebrate the success of the year's activities. Not to exceed 50 people (see Section C, paragraph 3.4.15).

Cost \$ _____

	NTE		
0002	24	Hours	\$ _____ \$ _____
Unscheduled meetings with mentors, supervisors, human resources staff; appearances at ceremonies/presentations/ programs put on by the Seattle District Corps of Engineers (see Section C, paragraph 6.7).			

STATEMENT OF WORK
2004 – 2005 Seattle District Leadership Development Program

1.0 The Seattle District, U.S. Army Corps of Engineers is seeking an accredited academic institution or consultant to develop and administer a part-time leadership/management development program for 12 Corps of Engineers employees who are typically college educated and range in years of experience and place in career. Disciplines represented include science, engineering, and business administration. The overall objective of this program is to help these employees learn, grow and develop in their effectiveness as leaders and managers within the Corps of Engineers and the Seattle District in particular. The contract period begins June 1, 2004 and ends June 30, 2005.

2.0 PROGRAM DESCRIPTION AND DEFINITIONS

2.1 The 2004 – 2005 Seattle District Leadership Development Program (LDP) announcement, Appendix A (see Section J of solicitation) describes the background, components, and scope of the Seattle District Leadership Development Program. So long as the overall objectives of the Leadership Development Program are attained, contractors may propose modifications to the basic program outline contained in the LDP announcement.

2.2 A glossary of definitions is included as Appendix B.

3.0 FACTORS CONSIDERED KEY TO THE SUCCESS OF THE LEADERSHIP DEVELOPMENT PROGRAM

3.1 Flexibility to capitalize on opportunities and additional learning experiences or information, which occur throughout the year, although, not anticipated in the original outline of the year's developmental activities. Additionally, flexibility is needed to be able to address the specific needs of the selected participants.

3.2 Continuity, from one learning activity to another, which is provided by the Contract Program Administrator, who personally participates in all the key LDP activities, brings together learning from separate activities into a cohesive whole. Lessons learned from one year to the next help overcome any perceived program design weaknesses while building on overall program strengths.

3.3 Development simultaneously at three levels:

- a. Internal to the person;
- b. Interpersonal among classmates and project teammates; and
- c. Organizational throughout the Seattle District; within our Division, which has headquarters in Portland, Oregon, and our national Headquarters in Washington D.C.
- d. The outcomes of this simultaneous development include:
 1. Heightened awareness of one's strengths and weaknesses as they pertain to leadership and management.
 2. Development and refinement of skills necessary to be an effective leader and manager, such as interpersonal communication, conflict management, innovation, situation leadership, stress management, values and ethics, management of change, budgeting, and related topics.
 3. Enhanced knowledge of how to be an effective team player.
 4. Greater insight into the visions, values, missions, and culture of the Seattle District and the Corps of Engineers.

3.4 Design Elements, which have proven successful during the seventeen (17) years of the Seattle District Leadership Development Program, are listed below. Contractors may propose other effective approaches to leader and manager development.

3.4.1 Graduate level class sessions, which provide a variety of contemporary leadership and management concepts presented by leading professionals in their fields.

3.4.2 A partnership of responsibilities between the Contract Program Administrator, Corps of Engineers LDP Steering Committee, mentors, supervisors and the Seattle District executive leadership illustrated through sharing the responsibilities for speakers, activities, time and resources, and emotional and technical support.

3.4.3 One five-day field trip which is scheduled and arranged by the LDP class and in coordination with the Contract Program Administrator and the LDP Steering Committee Chair visiting such sites as Corps construction and operating project offices, Portland and Walla Walla District Offices, the Northwestern Division Headquarters, as well as other public and private sector organizations located in the Pacific Northwest.

The purposes of the field trip is to:

- a. Provide a framework for understanding the Corps' role in the Northwest as well as Corps culture in general.
- b. Begin identifying strengths and weaknesses within the organization, which might be addressed by a team project.
- c. Provide insights into private sector leadership/management practices by visits to private sector organizations.
- d. Structure an informal setting in which the interns begin to form personal relationships and become acquainted with the Contract Program Administrator.

The Contract Program Administrator facilitates learning activities, which enhance interpersonal relationships and accomplish program objectives. These activities will occur in the vehicles en route, as well as during extended evening sessions.

3.4.4 A minimum of eight guest speakers from inside and outside of the Corps of Engineers providing a variety of points of view from successful leaders.

3.4.5 A one-day LDP orientation/goal-setting session held to initiate the program, which occurs prior to the initial two-day retreat. The orientation is conducted jointly by the Contract Program Administrator and the LDP Steering Committee. Topics include:

- a. Introduction of the LDP's, Contract Program Administrator, and LDP Steering Committee Representatives.
- b. Roles and Responsibilities of the LDP's, Contract Program Administrator, and LDP Steering Committee.
- c. Calendar of Events and time commitments.
- d. Dynamics of being a member of a learning group.
- e. Background information on diagnostic tools used in the retreat.
- f. Background on team projects and individual development plans.
- g. Objectives of the Initial Two-Day Retreat.

- h. Rationale for field visits.
- i. Question and Answer session.

3.4.6 An initial two-day / two-night retreat held for reflection, introspection, Individual Development Plan (IDP) development and class bonding (see paragraph 3.4.10).

3.4.7 A two-day mid-year retreat for reflecting on learning, thus far, sharing feedback, assessing goal achievement, and continuing both personal and LDP class team development.

3.4.8 A one-day, year-end closeout for additional reflection, introspection, and planning for future personal development.

3.4.9 Clear, candid, constructive feedback provided in confidential counseling sessions by the Contract Program Administrator to the participants. The objective is to help the participants gain insights into their progress regarding their IDP and leadership strengths and weaknesses, in order to build on the strengths and overcome weaknesses and blind spots which, if not corrected, might adversely influence their effectiveness as leaders and managers. The Contract Program Administrator is expected to provide at least two in-depth counseling sessions with each participant. One of those sessions will include the LDP class member's supervisor to build understanding, support and involvement of the supervisor in the employee's growth and development. Session will include review of the Individual Development Plan prepared during the initial retreat.

3.4.10 Readings from classic and contemporary literature on leadership and effective management (see Appendix E).

3.4.11 Leadership Development Program activities designed in a manner, which provides sufficient time for group process development, for varying personality styles to gather and synthesize information and experiences, and for practice in using new behaviors and/or techniques.

3.4.12 Team projects, which provide opportunities for the LDP class members to work closely in a smaller group toward jointly developed goals through participation on a project from concept to conclusion (see Appendix C).

3.4.13 Reflective essays prepared by each LDP class member within a week after each monthly class/retreat and the field trip and shared with the Contract Program Administrator for coaching advice and feedback. These essays are confidential between the LDP class member and the Administrator. Additionally, the LDP class as a whole will prepare an activity report for distribution to the LDP Steering Committee and the District Executive Team summarizing the activity and lessons learned.

3.4.14 Written evaluation of the effectiveness of the Leadership Development Program components and activities by each LDP class member and the Contract Program Administrator at the conclusion of the program year (see paragraph 5.3).

3.4.15 A graduation dinner and ceremony which is traditionally conducted during early June on an evening from 6:00 P.M. to 9:00 P.M. The purpose is to recognize the achievements of the LDP class members and to celebrate the success of the year's activities. LDP class members, their significant others, LDP Steering Committee members, mentors, supervisors, and District executives may be invited to participate in this evening which includes speeches and presentation of graduation certificates by the District Commander and the Contract Program Administrator.

3.4.16 Recognizing that leader-manager development is a lifelong, rather than a year-long process, an alumni dimension to allow for inter-class networking and to continue a focus toward improving personal leader-manager effectiveness is available to all program graduates. The LDP alumni, themselves, schedule, arrange, and facilitate the alumni activities. The contractor is NOT responsible for any aspect of the alumni dimension.

4.0 COSTS TO BE BORNE DIRECTLY BY THE U.S. ARMY CORPS OF ENGINEERS, WHICH NEED NOT BE INCLUDED IN CONTRACTOR PROPOSALS.

- 4.1 Travel and per diem of Corps of Engineers employees for approved LDP activities outside the Seattle-Tacoma area (with the exception of the initial two-day retreat and the mid-year retreat).
- 4.2 Transportation of Corps of Engineers employees within the Seattle commuting area for approved LDP activities.
- 4.3 Paper, pens, pencils, three-ring binders, and similar common use student supplies.
- 4.4 All costs of class members associated with team projects.
- 4.5 Use of the U.S. Army Corps of Engineers inter-office mail system, with advance approval of the LDP Steering Committee Chairperson.
- 4.6 Use of the Corps of Engineers facilities such as meeting rooms and audio-visual equipment, with advance approval of the LDP Steering Committee Chairperson, for special meetings.

5.0 MISCELLANEOUS CONDITIONS AND ISSUES

- 5.1 Once a contract and Contract Program Administrator have been accepted, substitution of the Contract Program Administrator shall only be made with the written approval of the Contracting Officer. Contracting Officer's disapproval of substitute Program Administrator(s) may result in termination of contract award.
- 5.2 At the conclusion of the program, the Contract Program Administrator shall provide each LDP class member with a certificate of completion suitable for framing.
- 5.3 In January and within 30 days after graduation (and elsewhere as needed), the Contract Program Administrator shall furnish the LDP Steering Committee Chairperson with written reports evaluating the effectiveness of Leadership Development Program components and activities, and providing recommendations for changes and improvements (see paragraphs 3.4.14).
- 5.4 The contractor shall invoice one-thirteenth of the total contract fee for the basic instructional services on a monthly basis. The contractor shall invoice monthly for other consultation services ordered during the previous month. Monthly billings may be combined but must be itemized by CLIN number as identified in SECTION B of the contract.
- 5.5 Prospective offerors may submit administrative inquiries in accordance with Federal Acquisition Regulation (FAR) 52.216-6 of the solicitation provisions, by contacting by phone at (206) 764-6780, by email at Susan.F.Newby@nws02.usace.army.mil, or by writing to:

Seattle District, Corps of Engineers
ATTN: CENWS-CT-CB-CU (Susan Newby)
P.O. Box 3755
Seattle, WA 98124-2255

The person to contact on technical matters is Lori Danielson, Contracting Officer's Representative, at (206) 764-6177, between the hours of 8:00 AM and 3:00 PM., Monday through Friday (excluding Federal holidays).

CONFERENCE SIGN IN SHEET

1. DONALD SUMMERS THE MERIDIAN CONSULTING
2. Steven D. Soltar ^{DBA:} (STEVEN D. SOLTAR)
3. JAMES MAINE CHAPMAN UNIVERSITY
4. LINDA Branch CSM Consultants
5. _____
6. _____
7. _____
8. _____
9. _____
10. _____
11. _____
12. _____
13. _____
14. _____
15. _____
16. _____
17. _____
18. _____

Seattle District Leadership Development Program 2004 thru 2005

Pre-Proposal Conference

15 January 2004

W912DW-04-R-0014

INTRODUCTION

- Welcome
- Meeting Minutes – Will be posted to the Solicitation by amendment.
- Comments/Clarifications
- Changes to the Solicitation
- Today's Attendance List

QUESTIONS

- Before asking a question, state your name and company name during the conference.
- Written questions may be turned in to me.
- Any questions needing research before response can be given will be posted by amendment, along with the main points of this conference.

QUESTIONS DURING THE SOLICITATION STAGE

- Contracting Web Address:

www.nws.usace.army.mil

- Technical Questions:

Lori Danielson, Ph: (206) 764-6177

FAX: (206) 764-6816

Email: Lori.D.Danielson@usace.army.mil

- Administrative Questions:

Susan Newby, Ph: (206) 746-6780

FAX: (206) 764-6817

Email: Susan.F.Newby@usace.army.mil

- Federal Acquisition Regulation: <http://farsite.hill.af.mil/>

PROJECT DESCRIPTION

- Leadership Development Program for the Seattle District, U.S. Army Corps of Engineers

SOLICITATION GENERAL INFORMATION

- Request for Proposal (RFP)
- No public bid opening.
- Requires submission of a Technical and Price Proposal (see section M, Evaluation Factors for Award)
- Proposals due into this office by February 9, 2004, at 2:00PM Local Time.
- Address for submittal of proposals:
Corps of Engineers, Seattle District
Attn: CENWS-CT-CB-CU, Susan Newby
4735 East Marginal Way So.
Seattle, WA 98134-2329
- **NO** offers will be accepted after the noted time/date.

SOLICITATION, OFFER & AWARD

- Standard Form (SF) 33
- Block 9: Proposal due date/time/place
- Block 14: Amendment acknowledgments
- Block 15A/B: Company information
- Block 16: Name & Title of person
authorized to sign
- Block 17/18: Signature & date

SOLICITATION, OFFER & AWARD

- Page 00010-4
 - Corporate Certificate
 - Must be completed by someone other than individual signing the proposal
 - If a joint venture, fill in Authority to Bind Partnership (by all partners)
- Pages 00010-5/6 (The Bid Schedule)
 - Prices
 - Base Items

SECTION C – DESCRIPTIONS AND SPECIFICATIONS

- Statement of Work
- Details of the program description
- Factors considered key to the success of the Leadership Development Program
- Costs not included in contractor proposals
- Other conditions and issues

Other Sections of the Solicitation

- Section E – Inspection and Acceptance
- Section F – Deliveries or Performance
- Section G – Contract Administration Data
- Section H – Postaward Conference
- Section I – Contract Clauses
- Section L – Instructions, Conditions and Notices to Bidders

Section J – List of Documents, Exhibits and Other Attachments

- Mark Ohlmstrom
- 2003 – 2004 Seattle District Leadership
Development Program

Section K – Representations, Certifications and Other Statements of Offerors

- Must be completed and submitted with price
proposal

Section M – Evaluation Factors for Award

- Contract will be awarded to the firm submitting the proposal that (a) conforms to the RFP, (b) is considered to offer the best value to the Government in terms of the evaluation factors, and (c) determined to be in the best interest of the Government.
- Proposal preparation costs will **NOT** be paid by the Government.
- Debriefings may be requested IAW FAR 15.505 & 15.506
 - Pre-award debriefing: All offerors excluded before award, must submit request to Contracting within 3 calendar days after offeror received notice of exclusion (NOE) from competition.
 - Post-award debriefing: Any unsuccessful offeror who has not had a pre-award debriefing, must submit request to Contracting within 3 days after notification of contract award is received.

EVALUATION FACTORS FOR AWARD

(SECTION M)

- Provides the Technical Evaluation Criteria, as well as the Evaluation and Award Procedures
- Technical Evaluation Criteria are:
 - Criterion A: ORGANIZATION EXPERIENCE/
CAPABILITY WITH SIMILAR PROGRAMS
 - Criterion B: QUALITY OF PROPOSED PROGRAM
 - Criterion C: PROGRAM ADMINISTRATOR
 - Criterion D: PAST PERFORMANCE

EVALUATION FACTORS

- Descriptions of Evaluation Criteria
- Ensure a complete proposal and reflects all elements required
- Technical Proposals are evaluated
- Proposals submitted in two parts:
 - Technical
 - Price

TECHNICAL EVALUATION

- Technical Evaluation Standards –
Definitions
 - Outstanding
 - Above Average
 - Satisfactory (Neutral)
 - Marginal
 - Unsatisfactory

PRICE EVALUATION

- Price Evaluation –
 - Evaluated for reasonableness
 - It is the intent of the Government to make award based upon initial offers without further discussions or additional information.

COMPETITIVE RANGE

(Developed after Technical Evaluation)

- The Government shall evaluate all proposals in accordance with FAR 15.305(a) and, if discussions are to be conducted, establish a competitive range. Based on the ratings of each proposal against all evaluation criteria, the Contracting Officer shall establish a competitive range comprised of all of the most highly rated proposals, unless the range is further reduced for purposes of efficiency pursuant to FAR 15.306 (c)(2).

COMPETITIVE RANGE

(Developed after Technical Evaluation)

- Discussions are conducted in writing, telephone or in person. Discussions are only conducted with offeror(s) in the competitive range.
- Primary Objective: to maximize the Government's ability to obtain the best value based on the requirement and the evaluation criteria set forth in this solicitation.
- Discussions will culminate in a request for Final Proposal Revision the date and time of which will be common to all remaining firms.

CONCLUSION

- Corps of Engineers website
- Ensure completion of all required information and submit with your proposals
- Ensure compliance with solicitation requirements
- Solicitation is **ONLY** changed by written amendment
- The Government intent to award to the firm that is the Best Value to the Government.

Seattle District Leadership Development Program 2004 thru 2005
Pre-Proposal Conference
15 January 2004

Present:

Susan Newby
Mark Ohlstrom
Donald Summers, The Meridian Consulting
Steve D. Soltar, DBA Steven D. Soltar
Linda Branch, CSM Consultants
Dr. Victoria Littlefield
Joyce Quintana

Date Taken: Thursday, January 15, 2004 at 1:00PM

INTRODUCTION

Ms. Newby: My name is Susan Newby and I'm the contract specialist of this project.

Ms. Dexter: My name is Angela Dexter and I'm the Procurement Tech.

Ms. Branch: My name is Linda Branch; my company name is CSM Consultant out of Las Vegas.

Mr. Soltar: My name is Steve Soltar; my company does business under that name.

Mr. Maine: My name is James Maine with Chapman University.

Mr. Summers: My name is Donald Summers with The Meridian Consulting.

Dr. Littlefield: My name is Dr. Victoria Littlefield

Ms. Quintana: My name is Joyce Quintana with Project Auditor

Mr. Ohlstrom: We do have two people on the speakerphone, so if we can talk a little louder than normal.

PROCEEDINGS

Mr. Ohlstrom: My role as the Leadership Development Program chairman is to keep an oversight of the program, to keep hands on what's going on with the program. My right hand person that I rely on significantly for managing the contract and day-to-day execution of the program is a woman by the name of Lori Danielson. Her name is in the solicitation. She will be the Contacting Officer Representative and also specifically the Program Manager for the contract. Her position outside the leadership program is one called Knowledge Manager. We developed a position here a number of years ago, for Knowledge Management, to gather all the aspect of our training and learning aspects, and transferring information as people leave to other organizations. She's a phenomenal individual in which she is very well easy to get along with and unfortunately she was called late last week to Washington, DC for some reconstructing work going on in the

organization. So, she is not able to be here. I was put in the position of answering any questions on this project.

Ms. Newby: My name is Susan Newby and I'm the Contract Specialist of this project. Mark Ohlstrom is the Chairperson for the LDP Steering Committee. He'll be speaking today on what the project entails. The main points that will be addressed in this meeting will be recorded and posted on the website to the solicitation by an amendment. The purpose of this Pre-Bid Conference is to give all interested parties a chance for clarifications and comments pertaining to the solicitation and for information purpose only. Changes to the solicitation will only be made through written amendments and will be posted on our website. There will be an amendment to be posted by next week since there were some discrepancies that were discovered. Today's attendance list will be included in the amendment. Our Contracting web address is <http://www.nws.usace.army.mil>.

All solicitation documents and amendments are posted on this website. For technical questions, please contact Lori Danielson, who is the Contract Program Manager for this project, at (206) 764-6177, her fax number is (206) 764-6816, and her email address is Lori.D.Danielson@usace.army.mil. For administrative inquiries, please contact me at (206) 764-6780, my fax number is (206) 764-6817, and my email address is susan.f.newby@usace.army.mil

The Federal Acquisition Regulation website is located at <http://farsite.hill.af.mil/> for solicitation provisions and clauses. The solicitations are governed by the Federal Acquisition Regulation (FAR).

SOLICITATION GENERAL INFORMATION

Ms. Newby: This project calls for a Request for Proposal (RFP). There will be no public bid opening. Information, other than technical changes or administrative clarifications, will not be provided during the evaluation process. This solicitation requires a submission of a Technical and Price Proposal. Section M, titled "Evaluation Factors for Award", entails the requirements for submission of your Technical and Price Proposals and how they will be evaluated. These proposals are required to be submitted to the address on the address on block 7 of Standard Form 33, which is the fourth page of your solicitation. No offers will be accepted after the time and date the proposals are due.

SOLICITATION, OFFER & AWARD

Ms. Newby: On page 4 of the solicitation is Standard Form 33; this is the form contracting utilizes for service projects and is in accordance with the Federal Acquisition Regulation (FAR).

Please note the proposal due date, time and place in Block 9 of the form. You may FedEx your proposals but they must arrive before the due date and time. Offers will not be accepted after the time and date. There will be no faxed copies of the proposal, nor

email copies. Does everyone have copy of the solicitation? If not, I have a copy for you to look at.

Dr. Littlefield: Sorry Susan you are starting to fade in and out. Could you speak more closely to phone?

Ms. Newby: I am sorry, will do.

Dr Littlefield and Joyce do you have copy of the solicitation?

Dr. Littlefield and Joyce: Yes we do.

Ms. Newby: In block 14, please note that this is where you will acknowledge any amendments or you may sign each amendment to acknowledge that you have read it. If you acknowledge by the Standard Form 30, which is the amendment form, you must submit with your proposals.

Note that block 15A and B is where you will fill out your company name and address. In block 16, the name and title of the person authorized to sign by your company must be included in this block.

An official authorized to bind your firm must sign and date in block 17 and 18 must be complete. If you are a joint venture company you must fill in the bottom part on page 5 and 5. Stop me if am going too fast please.

On page 00010-4 is where someone other than the individual signing the proposal must complete. If your company is a joint venture, all partners must fill in the Authority to Bind Partnership.

The Bid schedule is on pages 00010-5 and 6. The costs associated with line item 0001 will be inclusive of the activities outlined in the Statement of Work.

SECTION C – DESCRIPTIONS AND SPECIFICATIONS

Ms. Newby: Section C, entitled “Descriptions and Specifications”, is where the Statement of Work is located. The statement of work explicitly explains in details the program description, factors considered key to the success of the Leadership Development Program, costs not included in contractor proposals, and other conditions and issues. Mark Ohlstrom will explain more on what the project entails in a bit.

OTHER SECTIONS OF THE SOLICITATION

Ms. Newby: The other sections are clauses and provisions regulated by the Federal Acquisition Regulation (FAR) and the Defense Federal Acquisition Regulation (DFAR). Please read these sections thoroughly.

SECTION J – LIST OF DOCUMENTS, EXHIBITS AND OTHER ATTACHMENTS

Ms. Newby: The current 2003 -2004 Seattle District Leadership Development Program is located in Section J, entitled “List of Documents, Exhibits and Other Attachments. Mark Ohlstrom will explain the project description and what the program later on In Section K, entitled “Representations, Certifications and Other Statements of Offerors, this section must be completed and submitted with your price proposal. If you do not fill this out thoroughly, your proposal may be rejected for non-responsiveness and will be dismissed for further evaluation.

SECTION M – EVALUATION FACTORS FOR AWARD

Ms. Newby: A Firm-Fixed Price Contract will be awarded to the firm submitting the proposal that conforms to this Request for Proposal, is considered to offer the best value to the Government in terms of the evaluation factors, including price; and is determined to be in the best interest of the Government.

Proposal preparation costs will not be paid by the Government.

Debriefings may be requested in accordance with the Federal Acquisition Regulations (FAR) Subpart 15.505 and 15.506.

Offerors excluded from the competition before award will receive a notice and may request a debriefing before award by submitting a written request for a debriefing to the Contracting Officer within three calendar days after receipt of the notice of exclusion from the competition.

Any unsuccessful offeror who has not had a pre-award debriefing, must submit request to Contracting within 3 calendar days after the date on which the offeror received notification of task order award.

Section M provides the Technical Evaluation Criteria, as well as the Evaluation and Award Procedures. The Technical Evaluation Criteria are as follows:

- Criterion A: Organization experience and capability with similar programs
- Criterion B: Quality of Proposed Program
- Criterion C: Program Administrator
- Criterion D: Past Performance

EVALUATION FACTORS

Ms. Newby: Offerors must ensure their proposal is complete and reflects all elements required by the solicitation. The Technical Proposal does not have to be fancy. It will not be evaluated by its beauty.

Technical proposals are evaluated on their own merit and against the evaluation criteria only. They will not be evaluated against other proposals.

Proposals must be submitted in two parts:

- Technical – submit an original and 4 copies
- Price – Only one original needs to be submitted.

TECHNICAL EVALUATION

Ms. Newby: The proposals will be evaluated by using the adjectival descriptions detailed in Section M, under Technical Merit Ratings.

The Technical Evaluation Team will apply the appropriate adjective to each criterion that will be rated. The evaluator's narrative explanation must clearly establish that your proposals meet the definitions established for each Technical Evaluation Standards.

PRICE EVALUATION

Ms. Newby: Price will be evaluated for reasonableness; it will also be used to assess the offeror's understanding of the contract requirements and any risk inherent in the offeror's approach.

It is the intent of the Government to make award based upon initial offers without further discussions or additional information.

COMPETITIVE RANGE

Ms. Newby: In accordance with FAR 15.303(a), the Government will evaluate all proposals, and if discussions are to be conducted, the competitive range will be established based on the ratings of each proposal against all evaluation criteria. The competitive range is comprised of all of the most highly rated proposals, unless the range is further reduced for purposes of efficiency pursuant to FAR 15.306 (c) (2).

Discussions are usually conducted in writing, but may also be by telephone or in person. Discussions are tailored to each offeror's proposal and are only conducted with offeror(s) in the competitive range.

The primary objective of discussions is to maximize the Government's ability to obtain the best value, based on the requirement and the evaluation criteria set forth in this solicitation. If a firm's proposal is eliminated or otherwise removed from consideration for award during discussions, no further revisions to that firm's proposal will be accepted or considered.

After discussions are conducted, a request for a Final Proposal Revision will be submitted by the firm on the date and time of which is common to all remaining firms. The Technical Evaluation Team will then evaluate supplemental information provided by offers, adjust technical scores previously assigned, and provide a recommendation to the Contracting Officer. After evaluation of any changes to proposed prices, the Contracting

Officer will perform a best-value analysis. Selection will be made on the basis of the responsible offer, which conforms to the RFP and represents the most advantageous offer to the Government.

Ms. Quintana : : Are there criteria within the competitive range?

Mr. Ohlstrom: We evaluate first; what we'll evaluate is the technical merit of your proposal. And after we evaluate that we'll give an adjectival rating to it: Outstanding, Above Average, Satisfactory. Once we go through that, we will then determine what is the competitive range, who's the best technical, who's the next best, who's the next best. We will then get the pricing information. The team will not see pricing until after we complete the adjectival. Then pricing will come in then we will evaluate and make determination what proposal is the best value for the Government.

Ms. Newby: Recapping the major points of the explanation of the solicitation:

- Any amendments to this solicitation during the solicitation phase will be emailed to all offerors.
- Ensure you have completed all information required by the solicitation package and submit those items with your proposals.
- Ensure you are in compliance with the solicitation requirements.
- Remember that the solicitation is only changed by issuance of a written amendment.
- The Government intends to award on initial offers, to the firm that will provide the Best Value to the Government to accomplish this mission.

Now we'll turn our attention to Mark Ohlstrom on the details of the program.

BACKGROUND ON THE LEADERSHIP DEVELOPMENT PROGRAM

Mr. Ohlstrom: The Leadership Development Program here in Seattle District is currently in its 17th year. It was one of the first in the Corps of Engineers and has evolved over time. We used to call it our Management Intern Program, MI Program, and we changed the name recently to the Leadership Development Program. Most Corps of Engineers District offices, or Division offices, now have Leadership Development Programs. So there are others throughout the nation. There are other websites of the Corps of Engineers programs that are out there.

The attempt of the program here in Seattle District is to improve the individual's skills and knowledge to enhance their careers and hopefully make them more productive to the organization here in Seattle District. But it sort of focuses on the person versus on the organization.

As you look through the Statement of Work, you'll see that we started off with an opening introductory meeting; a one-day session to give an overview of the program. I will be involved with that, Lori Danielson will be involved with that, to help facilitate kicking off the program. Following that, there'll be a two-and-a-half day retreat at a location of your choosing; we prefer in the local area so we don't have to send them across country for airfare. But we do allow driving; we go to different places throughout the Puget Sound area, probably within about a 2-hour commute at a hotel, particularly with a conference center, or a hotel with a meeting facility. And the idea is really to go into a retreat and get people to focus on themselves and start forming the group. That's the intent of the retreat.

During that period of time, you'll also be working on putting your schedule together for your classes. There's a requirement for 80 hours of classroom instruction or classroom-type instruction, and no more than 8 hours at a time. So you're looking at minimum of ten 8-hour sessions of classes.

After the initial retreat, the two-and-a-half day retreat, we're looking at a 5-day field trip. And that typically is in the Northwest area. We've covered Washington, Idaho, Montana, Oregon areas to visit, looking at Corps of Engineers projects, other federal agencies, military installations, and private sector firms that our people can learn from as leadership models. The intent is to expose the participants to how people do business, their mindset on how they manage and how they lead and what makes them successful.

There is a requirement for a mentoring component. The role of the Program Administrator in mentoring is to facilitate setting up the relationships between participants and mentors, encouraging people, making sure that they have established mentoring relationships with a senior person in the Seattle District Office. Participants are able to pick more than one mentor; they can have mentors at different levels of the organization but we're primarily looking at bringing in one mentor, a senior in the organization to learn from. A session will be set up with the mentors and with the supervisors of participants by the Program Administrator to inform them of what the intent of the program is, what your philosophy is going to be, what the picture looks like of what your course of studies are going to be and how you're going to put things together throughout the year.

Also, during the initial part of the year, the first third of the year, we expect the Program Administrator to facilitate the putting together of team projects. Participants are required to develop, formulate, and get approval through the senior leadership of the organization, proposals of what they would like to tackle in terms of a project that's going to enhance the organization as well as enhance their learning objectives for the year. It's fairly open-ended. The Senior Executive team and other management in the organization are available to provide advice and input into what they are looking at prior to their project presentation. The participants develop ideas to make a presentation to the Senior Executive team; it gets approved, and then they execute it and give a presentation at the end of the year. The Program Administrator is expected to facilitate in helping

participants through that process and make sure they're on the right track and have a successful conclusion to their project.

There is also a mid-year retreat; again, at an offsite location typically within the region, a day-and-a-half, I believe, to check in, validate, and to help further enhance the learning environment and the growth of the individual.

Towards the conclusion of the year, there is a closing retreat and then there is a graduation ceremony that will include a speaker/speakers from the class, or it may be the Program Administrator, whoever the participants want as a speaker; dinner and presentation of certificates of completion or whatever you so desire. The dinner with the graduation ceremony is to be planned for a maximum of 50 people. We will clarify that in a further amendment; it's in the bid schedule. It wasn't in the text of it but we will clarify that it is up to 50 people. The graduation participants include the program administrator, Senior Executives, mentors, and a family member of the program participants. That's essentially the program in a nutshell.

Do you have any questions about the intent of the program or any specifics about the program?

Mr. Summers : [The mentors that are chosen by participants, are they experienced in mentoring?]

Mr. Ohlstrom: Usually all have been previous mentors, but not always. As we change over leadership, sometimes we bring in senior leaders that are from outside the organization and certainly may not be read-in to our leadership development program, per se; they may have not been mentors before.

Mr. Summers : So there may need to be some preparation of the mentors.

Mr. Ohlstrom: It may be as simple as they're given a reference to a book, or reference to some articles, or receive a brief session on what is mentoring and receive answers to any questions,. Lori Danielson and myself will work with the successful bidder to inform them whether the mentors have been seasoned mentors or not.

Ms. Branch: Is there any benefit of checking out other Programs within the Corps and including new ideas in our proposal?

Mr. Ohlstrom: Formally we are not putting requirements for this one-year contract on specifics like that. That is up to individual bidders on what you want to propose in terms of what you believe will be valuable, what you believe will be cost effective. And if it does seem valuable and cost effective, we will open it for this year. One of the team projects for this year's program is to re-evaluate our program and make recommendations for the future. Because our existing contract ends in June, we didn't have time to deal with those issues this year. And that's why we're going out with a one-year contract, is to basically maintain as we go along, looking for someone who wants to become

innovative, creative with ideas that are within the constraints of what's defined here in the solicitation. You are welcome to do that.

Dr. Littlefield: [Is there a preference for how instruction classes are scheduled, one-day a month versus multiple days at a time?

Mr. Ohlstrom: There's not a preference in terms of points given. Again, it would be for overall presentation of how you feel it benefits. The typical, I will say, has been for 8 hours of classroom training, one day a month, over a period of 10 months. You can propose an alternative to that concept but a class session needs to be at least one full day (8 hours) with a total of at least 80 hours of instruction being provided.

Mr. Summers : Is there an advantage with providing college credit for the instruction provided?

Mr. Ohlstrom: Coming out of the requirements of the solicitation in terms of evaluation, again, it would be the overall package of how much that would enhance it. That's something we are evaluating for the future but for this particular contract, I can't say that it would be definitely be a plus. We would probably take it into consideration. Because there are people that desire the credits.

Mr. Ohlstrom: Any more questions about the program that I can help on?

Mr. Summers : What is the experience level, or grade level, of the participants?

Mr. Ohlstrom: It varies in our program because we try to develop people at all levels of the organization. We believe that all people can be leaders in the organization. We've opened the program to anyone that is an employee of the district with at least one year of service. So, we will have people that were born and raised in the Corps of Engineers atmosphere, to those that have come in mid-career, to those who have come in later career that would gain value from the program. If I would describe a typical participant, it is probably somebody with 12-15 years of experience, the GS-12 range, if you're familiar with the GS rating system, which is basically a senior staff level person, is a typical candidate we would look for. Someone that's established themselves, proved themselves in the organization, demonstrated great leadership ability, and this program will help fine tune and further develop their skills in the way of personal skills, of leadership skills, and of management skills. But we do have people that come from, what we call, Wage Grades. We do have operating projects, trades craft people, and we've had administrative people in our program before. So, it's not one size fits all. We'd like to get a mixture of people from gender, age, and as well as where they are located within the organization. We have an Operations part element of our organization, Engineering & Construction, Project Management, Contracting, Real Estate, Legal, Logistics, Information Management, to mention a few, but a fairly diverse organization – 850 people here in Seattle District, and, again we try to encourage a diversity from those divisions.

Mr. Summers : As a follow up to that question, it sounds as if we could have participants with very little formal education or training.

Mr. Ohlstrom: That's absolutely correct. That is one of the challenges in terms of program administration, in teaching people with the variety of styles for these activities. From people that may have only had high school education to those that have Masters or Doctorate degrees. We have not found it to be a significant problem. It is a challenge on how you address that but there has not been a major problem in our district.

Mr. Ohlstrom: Any other questions at this time?

Dr. Littlefield: Do you folks have a Military Mission?

Mr. Ohlstrom: We are what's considered a full service district for the Corps of Engineers. We support military installations; we have a 5-state region we cover, Washington, Oregon, Idaho, Montana for military. And then our Civil Works mission is by watersheds; covering most of Washington, Northern Idaho and Northwest Montana. We also have Hazardous Toxic Recovery Waste (HTRW) mission that we support.

Ms. Quintana : When can we submit questions after this conference?

Mr. Ohlstrom: Any time until the bids are due you can submit questions to Susan Newby.

Ms. Quintana : Yes and who will answer them?

Mr. Ohlstrom: She'll give someone in the district the question and she'll put it out as an answer.

Mr. Soltar: I see there is some evaluation process of the current Leadership Development Program that I gather, is it under way now?

Mr. Ohlstrom: Yes, it's under way now.

Mr. Soltar: It's under way now?

Mr. Ohlstrom: Our class projects have broken into three this year. We have a group of 12 individuals in our program; so we have three groups of four. One group of four is looking at evaluating other Leadership Development Programs in the Corps of Engineers and elsewhere and provide recommendations of what they think might be beneficial for this program to continue in the future.

Mr. Soltar: Will the results of this evaluation be available to the next contractor?

Mr. Ohlstrom: Absolutely.

Dr. Littlefield: I'm sorry, I did not hear the question.

Mr. Ohlstrom: The question was, "Is the results of the Leadership Development class project on LDP program be available to next year's contractor?". And the answer, "Yes, but it will be after this, hopefully, this contract is awarded. The projects will not be completed until April, May timeframe. And our hope is that the contract be awarded no later than March.

Dr. Littlefield: When do you want this contract to start?

Mr. Ohlstrom: The program starts in June. Let me look at my calendar; June 1st is when this contract starts. Our kickoff ceremony happens about the 3rd Friday of the month of June. That is when we have what's called Corps Day, celebrating the birth of the Corps of Engineers, which is June 19th, 1775, battle of Bunker Hill. This is a morning ceremony where we congratulate last year's graduates and welcome the new class. Then we have an afternoon picnic. So, that's the ceremony we desire to have the Program Administrator present for both the new class and the old, outgoing class. Typically we've had the first session, the opening, initial session, the one-day session prior to that, just to get things going.

Mr. Sommers: I think I read in the solicitation in the technical requirements that you would assess the needs of the incoming group. Do you need a list of speakers, topics and so on and so forth without the needs assessment?

Mr. Ohlstrom: The contract calls for the general outline of what type of initiatives or areas that you want covered. Again, it is not mandated that you have to find specific speakers and never change. But, we do look for a program being put together and the general requirements of that program should be followed. Typically, we've been flexible in working with the Program Administrator in terms of what they feel they need. Particularly, we sit down and talk to them ourselves and Lori talks to the person and works through what specifically we want. But the general nature of the program is, basically, 10 classes of 8 hours each. And covering these class topic areas, is what's talked about and is covering a portion of your proposal. Once you propose, that then becomes part of the contract, and that's what you're going to be held to if we so desire. We do work with the person and so when there's a valid purpose and need to modify from that proposal, we can do that. We feel that we can tweak it as we go along.

Question: Are senior leaders from throughout the Corps of Engineers available as speakers? What about other outside speakers?

Mr. Ohlstrom: Schedule is really the only constraint. Especially if it's local. If it's from the Seattle office and speaking locally. We've had success in the past of getting people from outside of Seattle, it depends on their availability. Particularly, if it's a Corps employee, they will come at the Corps expense. Outside of the Corps, again, it's part of the program cost associated in bringing in speakers.

Ms. Branch: The speakers you have since the program has been in existence for quite some time. Do you have a list of who those speakers are?

Mr. Ohlstrom: Not really. I've got some people that we've used in the past but we've left it to the Program Administrator to sit there and pick what they want, and it has varied over time. But once you get your contract in place, if you want to talk to us about that, we can work with you and tweak in a few ways to meet the needs upon mutual discussions of what the changes would be.

Dr. Littlefield: I'm sorry but I have to leave now. I also have a class that has come back from their retreat and have to go and be with them now. Thank you for the opportunity.

Mr. Ohlstrom: Good luck and have a great afternoon and we'll get the minutes out to you.

Ms. Quintana: Mark, this is Joyce Quintana again, I have to also cut out. But, I'd like to echo Victoria's comments.

Mr. Ohlstrom: Appreciate it; I look forward to working with you in the future.

Ms. Quintana: Thanks, Mark; thanks, Susan. Bye.

Mr. Summers: What has been your experience with encountering group dynamics issues?

Mr. Ohlstrom: It's varied from year to year. Each class is different. The best success is seeing a group of people meld together as a team, especially when it's cross district. So much of our work in our district is in terms of cross-functional teams now. The more we can help facilitate understanding of what other people do in other parts of the organization, of forming relationships, contacts in the parts of the organization; it helps facilitate our ability to be successful in our organization. Certainly, personal growth and development, to see people begin to understand what's helpful to them, to enhance their careers and advance in the organization, and become more productive is very rewarding. Personally, I was in the mentoring aspect of that. Been there for a number of years, and found that very beneficial to have interchanged in the sessions and learned from people. I hope that I imparted some of that to those people who I work with.

Mr. Summers: What has been your experience in needing to call upon the back-up Program Administrator into the program in the past?

Mr. Ohlstrom: Usually, we've had conflict of schedules. Our program is fairly small in duration, in the number of hours per year. So, if a person wants to make a living, we recognize that they're going to have to do more than this program, so it's understandable times when there's a conflict; could be an illness, could be a death in the family, could be all sorts of things. That's why we want someone available that you've selected that you've worked with that can back you up and take care of us in your absence. So, if

you're planning to conduct a class or conduct a program for a given day or given period of time, and you're not available, the expectation is to have someone to do it. So what we're trying to avoid is the one person shop that works entirely by themselves and has nothing reserved. So, we'd like to have that available, identified and available, to hold accountable up front in case the unforeseen happens. Because unfortunately it does happen from time to time. We've not had problems; nothing significant and it has always mutually worked out. But we do want that ability because this is the biggest investment that we have for training in our district in a given year, and it's extremely important to us to make this successful.

Mr. Soltar: In the requirement for Program Administrator, what is considered "related field"?

Mr. Ohlstrom: Do you remember what section it was in?

Mr. Soltar: I think it's in the evaluation.

Ms. Newby: Section M.

Mr. Ohlstrom: Number 5, Technical Proposal Minimum Requirements and Evaluation Method, Paragraph C, Program Administrator, Paragraph 1, Education, "The proposed Program Administrator must have a Masters-level degree in organizational development, organizational effectiveness, organization management, human behavior, counseling or related field." The related field to me would be demonstration that you have the ability to conduct leadership, and because leadership is not limited to people that have gotten a P.H.D. or have gotten an M.B.A. or M.P.A., or a Psychology degree. We are open to looking at what are your qualifications are that enhances your ability to be productive. We are certainly an Engineer organization. If you had a Masters in Engineering, that might be beneficial if you can do good. Anyway, our focus is to developing individuals through leadership, understanding human behavior under the same organizational management, understanding leadership. So, what does your degree do to enhance that? If you feel that you can draw that, that doesn't meet the exact title, we'd be willing to evaluate that. But it's not cut and dry.

Question: Who is the current contractor?

Mr. Ohlstrom: Sally Fox

Mr. Soltar: Reference to some of the offeror's representations and certifications, I sometimes question also about whether I'm obligated to, as a sole proprietor, have an EEO plan, whether I purchase things from Israel, or noted in some of those things. If I need or wish individual help with filling these things out, I see Ms. Danielson's name as that contact information.

Mr. Ohlstrom: We like to go through one person just so we can keep track of what's going on. That's our desire. So, if we know there needs to be a change we can coordinate it. So the best is to go through Susan Newby, but Lori Danielson is available if you can not get a hold of Susan.

Mr. Soltar: Do we bring our proposal through the front desk and up to the 2nd floor if we wish to hand-deliver?

Mr. Ohlstrom: Physically, you need to hand-deliver to the Contracting Office on the 2nd Floor because the front desk personnel can not accept packages. Because of the security concern, the front desk personnel will not accept it. So, you need to show your ID and process through and do that. So, give yourself time to process through and walk up to the 2nd floor to present your proposals.

Mr. Soltar: Is it all the way this end of the building?

Ms. Newby: I can walk you down there.

Mr. Ohlstrom: It's closer to the front desk.

Mr. Ohlstrom: Susan, one thing we do need to clarify, I saw in the website that it shows that the bids are due in the 6th of February and on the solicitation form, it says 9th of February.

Ms. Newby: Let me clarify that: the solicitation supersedes any other information. Therefore, whatever the solicitation states is the case. We will change the website to state bid opening on the 9th of February, and it will be in the minutes.

Ms. Branch: Can you tell us who the incumbent contractor is and what the cost of the contract?

Ms. Newby: Sally Fox and the approximate cost for the three year contract is \$285,000.

Ms. Branch: Is she competing for this contract?

Ms. Newby: At this point, I can't say. But there is a bidder's list that you can download on our website where you have downloaded your solicitation.

Mr. Ohlstrom: I've downloaded it this morning and there is a list of about 5-1/2 pages long.

Mr. Soltar: That doesn't mean that everybody will bid on this.

Mr. Ohlstrom: No; the size of the list is not that unusual. Because, typically, we would send to people that would express interest and send it out because we want to get wide interest. The number of actual bidders is usually substantially less.

Ms. Branch: This was very well written.

Ms. Newby: Thank you. I will walk you all down to Contracting, where your proposals will be accepted.

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